



How to “KonMari” Your Marketo Instance for Peak Performance

Helen Abramova

Matt Gomez | October 2019

Housekeeping

- This webinar is being recorded! Slides and recording will be sent to you after the webinar.
- Have a question? Use the chat box and we'll answer your questions after the webinar.
- Posting to social media? Use our hashtag #mktgnation



About



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Marketo 2 x Champion
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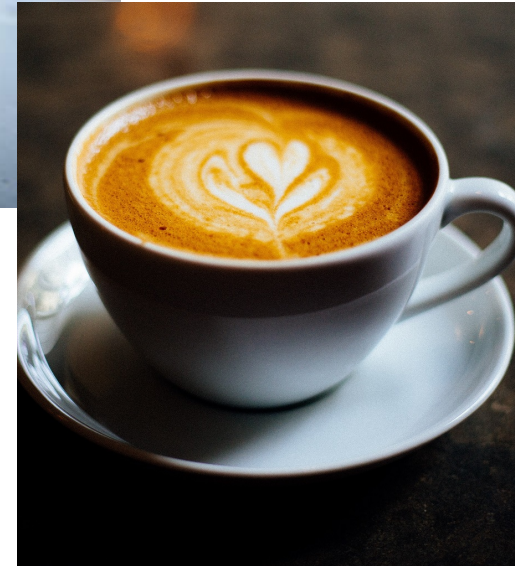
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Sr. Manager Marketing Operations & Marketo Admin,
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A few notes before we start

- You know your environment better than we do.
- Our advice is purposefully high level [advice, not a recipe].
- You need allies and partners in this journey.
- There is no “magic bullet” for some issues
- ...but there might be something that can help in all cases.

If you've committed to tidying up, let's get started!



Why Tidying Up?

EASY
SAFE
EFFICIENT



“Natural Forces” of Mess



SYSTEM ASPECT

The Second Law of Thermodynamics

The total entropy of an isolated system can never decrease.



HUMAN ASPECT

Broken Windows Theory

Visible signs of disorder encourages further disorder.



PROBABILITY ASPECT

Murphy's Law [almost]

Anything that can go wrong will go wrong (at some point).

KonMari Method and Marketo

- Rule 1. Commit yourself to tidying up **your instance**.
- Rule 2. Imagine your ideal **lifecycle**.
- Rule 3. Finish **foundations** first.
- Rule 4. Tidy by category, not by location.
- Rule 5. Follow the right order.
- Rule 6. Ask yourself if it sparks **joy of your customers!**



Start slow to move fast:
*what you absolutely need to build in the center of
excellence*



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Center of Excellence & Governance

Foundations for tidy users

- Users and Roles
- On-boarding process
- Documentation
- Process and Responsibilities

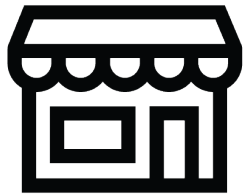
Foundations for tidy data

- Security and Compliance
- Data Management
- Data Hygiene

The screenshot displays the Admin console interface, organized into a grid of sections. At the top left, there is a gear icon and the word "Admin". The main content is divided into several categories, each with a list of links and a corresponding icon on a blue background:

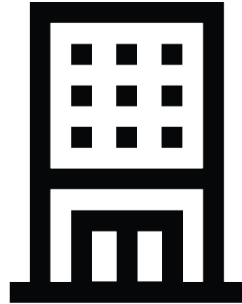
- Security** (lock icon):
 - [My Account](#)
 - [Login Settings](#)
 - [Users & Roles](#)
 - [Audit Trail](#)
 - [Workspaces & Partitions](#)
- Integration** (cloud icon):
 - [Salesforce](#)
 - [Sales Insight](#)
 - [Landing Pages](#)
 - [Munchkin](#)
 - [Web Services](#)
 - [LaunchPoint](#)
 - [Webhooks](#)
 - [Mobile Apps & Devices](#)
- Other Stuff** (gears icon):
 - [Location](#)
 - [Smart Campaign](#)
 - [Email](#)
 - [Communication Limits](#)
 - [Marketo Sky](#)
 - [Tags](#)
 - [Revenue Cycle Analytics](#)
 - [Single Sign-On](#)
 - [Treasure Chest](#)
- Database Management** (database icon):
 - [Field Management](#)
 - [Salesforce Objects Sync](#)
 - [Marketo Custom Objects](#)
 - [Marketo Custom Activities](#)

Scale Matters



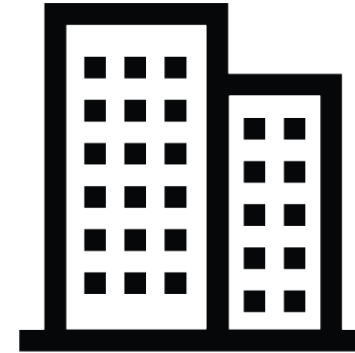
TECHNOLOGY AS EFFICIENCY

Team of one
Jack of all trades role
Quick and agile
Self help



TECHNOLOGY AS ENABLER

Team of few
Division of labor
Collaboration
Flexible processes

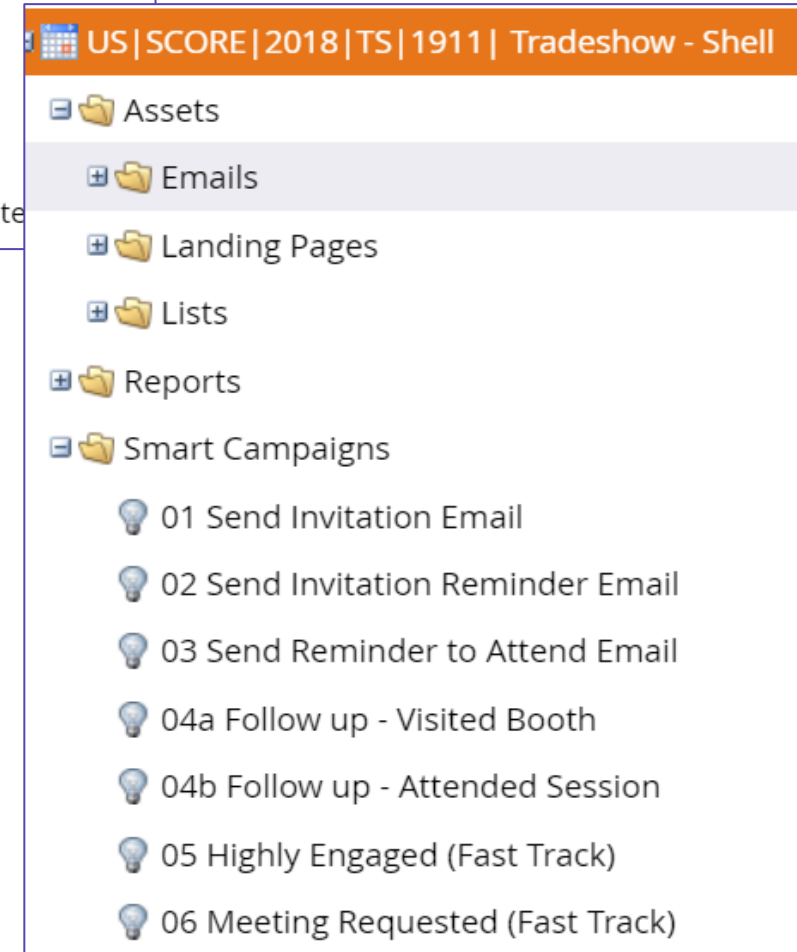
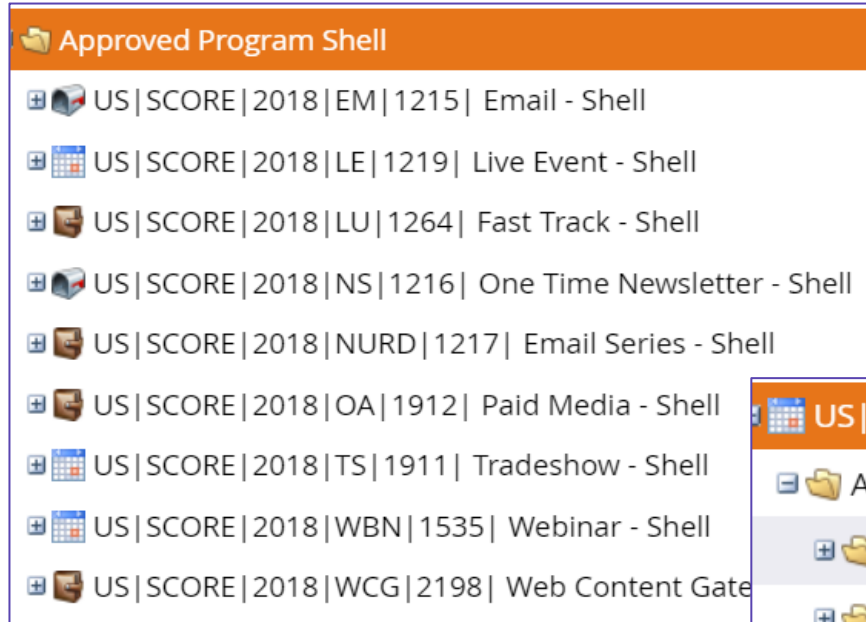


TECHNOLOGY AS AMPLIFIER

Many teams
Narrow specialization
Detailed processes, SLAs
Rules of engagement

Making Clean Easy

- **Naming Convention**
for both MKTO and CRM
- **Folder Structure**
by the usability principle
- **Channels and tags**
to meet reporting requirements
- **Program shells**
for each tactic/channel
- **Email and Landing page templates**
- **Standard Forms**
- **Footers and snippets**



Tidying up your instance:

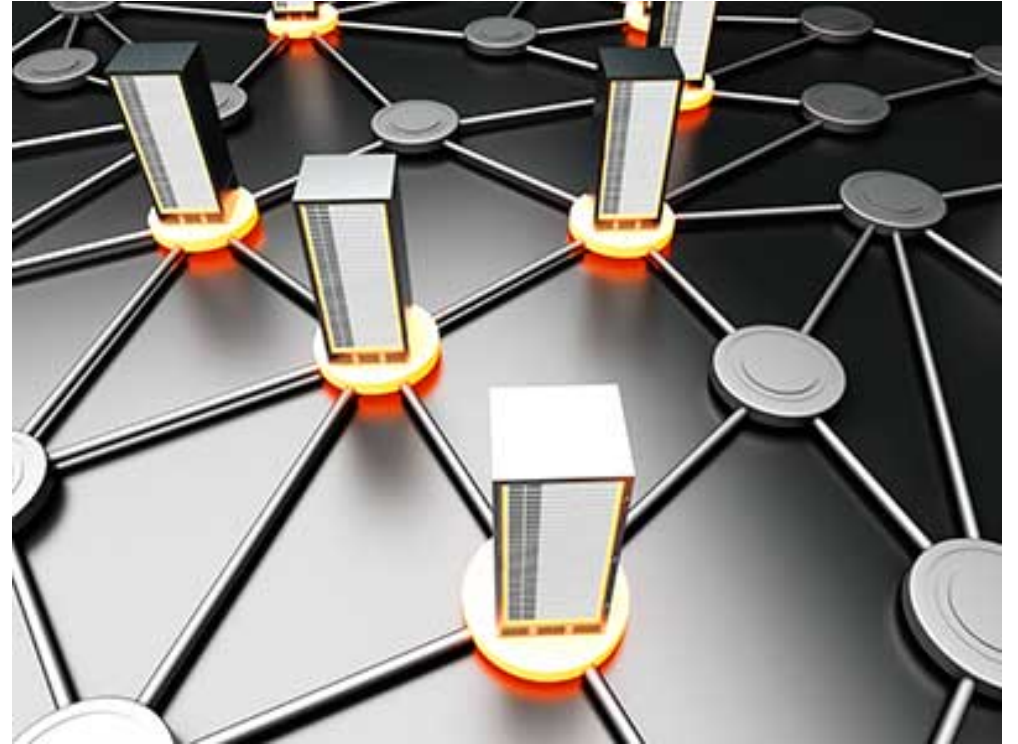
Remove the mess before it swamps your leads



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Know your environment

- How is your environment configured?
- Who set it up originally? How long ago? What has changed?
- Is there a CRM synced to Marketo; which one?
- Who do you know in your organization that can help?
- We need to discard first:
 - Undeliverable email addresses
 - Duplicate records
 - Unused fields



KonMari Method Tip – Imagine your ideal lifestyle.



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Undeliverable Email Addresses



Undeliverable Email Addresses: What does Marketo already do for you?

- Captures data for you
- Marks Email Invalid
- Marks Email Suspended
- Provides the means to build your own solution based on your own model

Email Invalid:	<input checked="" type="checkbox"/>
Email Invalid Cause:	550 5.2.1 <medi123@att.net>... Addressee unknown, r
Email Suspended:	true
Email Suspended Cause:	553 5.3.0 alph143 DNSBL:RBL 521< 192.28.147.174 >_is_blocked.__For_information_see_http://att.net/blocks
Email Suspended At:	Jun 28, 2016 11:35 AM

Gap analysis:

1. Some email addresses marked invalid are fixable
2. Some bounces remain emailable, which jeopardizes your deliverability and reputation
3. There is no one place to see and manage bounces
4. It is unclear where to go for help



What can you do today?

- SPF and DKIM authentication – work with Network Admins
 - <https://docs.marketo.com/display/public/DOCS/Set+up+SPF+and+DKIM+for+your+Email+Deliverability>
- Create a bounce management infrastructure
 - Demo on next slide!
- If you still need help, you can work with Marketo Deliverability team, or use a 3rd party tool from Launchpoint
 - <https://launchpoint.marketo.com/>

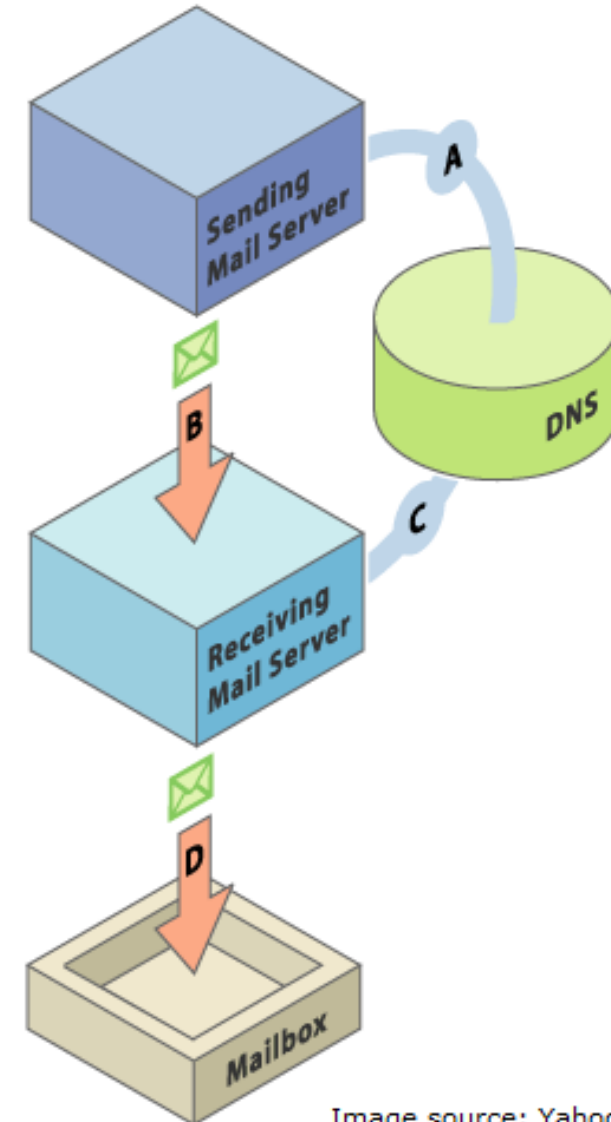


Image source: Yahoo

Creating a Bounce Management Program

- Create a program (default type)
- Hard Bounces:

The screenshot shows a configuration interface for a bounce management program. At the top, there are options: 'Use ALL filters', 'Collapse All', and 'Expand All'. Below this, there are two filter sections:

- 1 - Email Bounced:** This filter has two conditions: 'Email: is any' and 'Date of Activity: in past' with a value of '10 days'. There is an 'Add Constraint' button to the right.
- 2 - Email Invalid:** This filter has one condition: 'Email Invalid: true'.

- Spam traps and other soft bounces:

The screenshot shows a configuration interface for a bounce management program, similar to the one above. At the top, there are options: 'Use ALL filters', 'Collapse All', and 'Expand All'. Below this, there are two filter sections:

- 1 - Email Bounced:** This filter has two conditions: 'Email: is any' and 'Date of Activity: in past' with a value of '10 days'. There is an 'Add Constraint' button to the right.
- 2 - Email Suspended Cause:** This filter has one condition: 'Email Suspended Cause: is not empty'.

Creating a Bounce Management Program

- Create a program (default type)
- Hard Bounces:

The screenshot displays an email management interface with a table of bounced emails. The table has the following columns: Id, Email Invalid, Email Invalid Cause, Email Suspended Cause, and Email Suspe... The data rows are as follows:

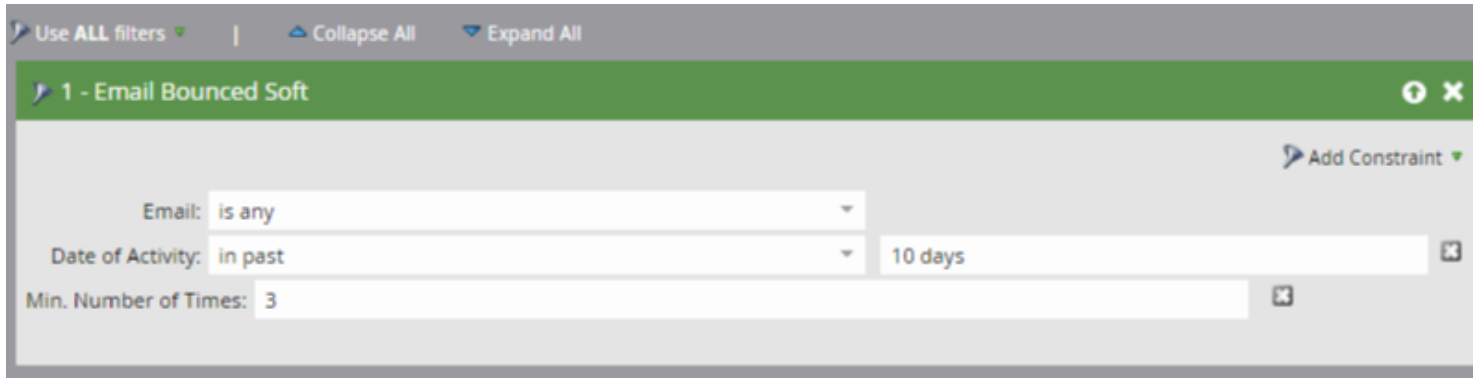
Id	Email Invalid	Email Invalid Cause	Email Suspended Cause	Email Suspe...
60126216	true	550-5.2.1 The email account that ...	550-5.7.1 The user or domain that ...	Jun 27, 201...
8761755	true	550-5.1.1 The email account that ...	550 [internal] [oob] The message ...	Apr 22, 201...
49076063	true	550-5.1.1 The email account that ...	550 [internal] [oob] The message ...	Dec 27, 201...
7918629	true	550 [internal] [oob] The recipient i...	550 [internal] [oob] The message ...	May 31, 201...
8072791	true	550 [internal] [oob] The recipient i...	550 [internal] [oob] The message ...	Sep 4, 2018 ...
8370562	true	550 [internal] [oob] The recipient i...	550 [internal] [oob] The message ...	Sep 4, 2018 ...
7839622	true	550 [internal] [oob] The recipient i...	550 [internal] [oob] The message ...	Aug 3, 2017 ...
8588270	true	550 [internal] [oob] The recipient i...	550 5.4.1 All recipient addresses r...	May 1, 2019...
6858880	true	550 Invalid Recipient - https://com...	550 Rejected by header based ma...	Jul 2, 2019 1...

- Spam traps an



Creating a Bounce Management Program (continued)

- Soft Bounces:



The screenshot shows a configuration window for a smart list titled "1 - Email Bounced Soft". At the top, there are options for "Use ALL filters", "Collapse All", and "Expand All". Below the title bar, there is an "Add Constraint" button. The main configuration area contains three fields: "Email: is any" (a dropdown menu), "Date of Activity: in past" (a dropdown menu) followed by a text input field containing "10 days", and "Min. Number of Times: 3" (a text input field). Each field has a small "x" icon to its right for removal.

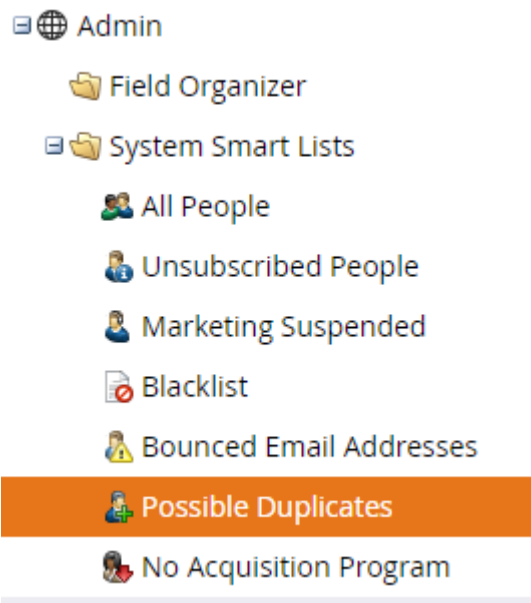
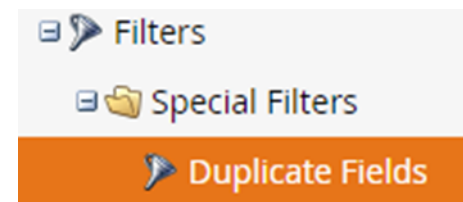
- Now review the people captured by these smart lists as often as you like.
 - Find addresses that are fixable (“@gmal.com”, “@yahoo.com”) and correct them, then set Email Invalid = False.
 - Create a call list for your Sales partners to call and get updated email addresses
 - For any leads with addresses that are repeatedly failing, you can set your own policies!

Duplicate Records



Duplicate Records: What does Marketo already do for you?

- Dedupes incoming leads by email address
- “Possible Duplicates” system list you can review regularly
- Provides a ‘Merge People’ flow action so you can choose the records and fields that stay, and those that are overwritten



Test	John_test	johntest2@mailinator.com	Contact
Test Walden	John	johntest2@mailinator.com	Contact
QQCheckIn...	QQCheckfn...	ggcheckfn149gg	Contact
QQCheckIn...	QQCheckfn...	ggcheckfn149gg	Contact

A dropdown menu is open over the third row, showing the following options: 'Person Actions' with a person icon and a red 'X', 'View Person Details' with a person icon, 'Merge People' with a person icon and a red 'X', 'Marketing' with a person icon and a right arrow, 'Programs' with a person icon and a right arrow, 'Special' with a person icon and a right arrow, and 'Salesforce' with a person icon and a right arrow.

Duplicate Records: Gap Analysis

Gap analysis:

1. Unaddressed sources
2. Non-email duplicates
3. Different architectures



What can you do today?

In this order:

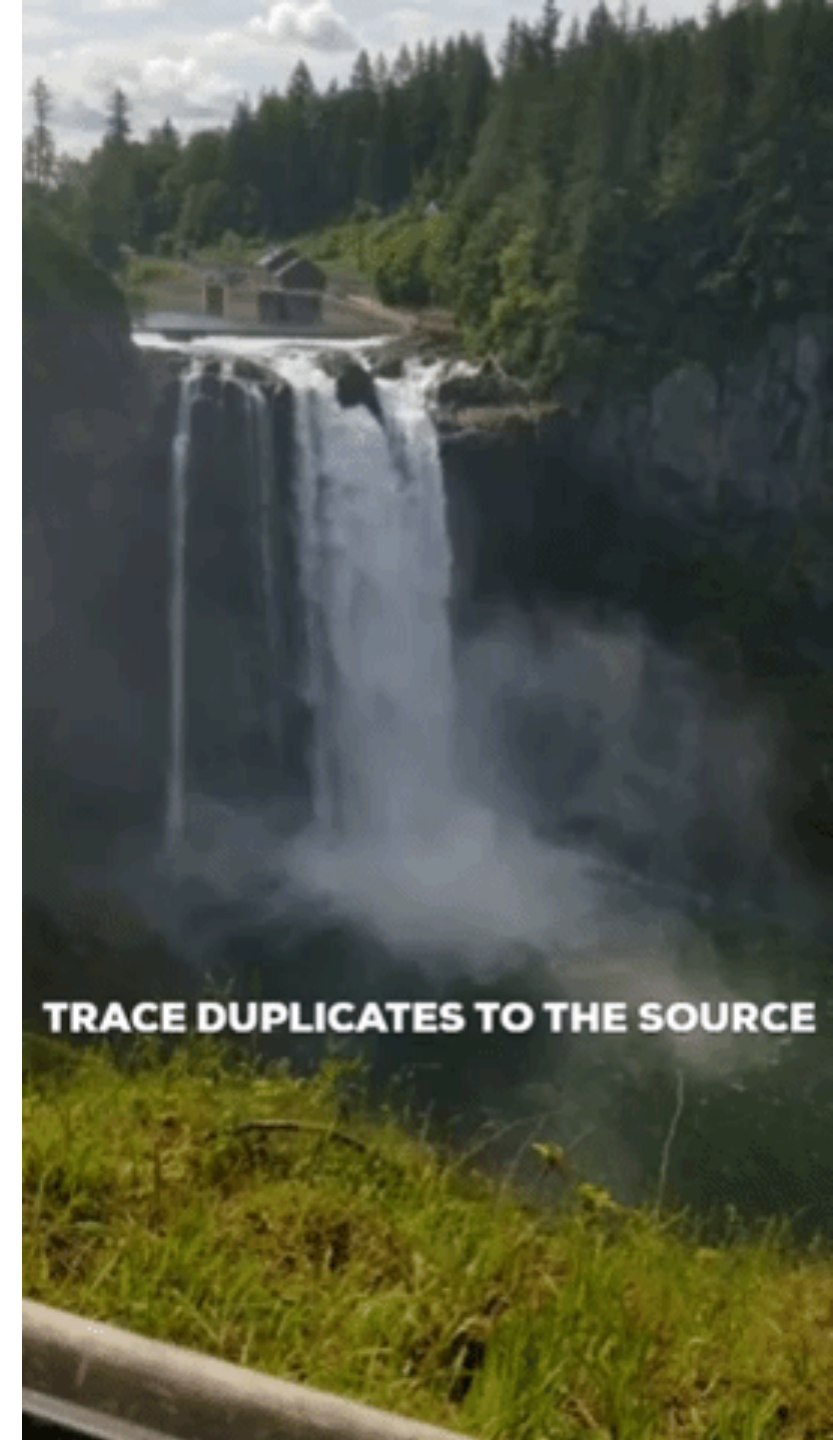
- Discover the source of duplicates in your database
- Work with your internal and external partners to address the sources
- Configure monitoring campaigns and proactively address future issues as they arise

Considerations before merging

- Your CRM will often be the source of duplicates
- When you merge records, you lose field level data, but all activity is appended to the winning record.
- Person records that have been merged will have more than one “Person is created” activity in their log.



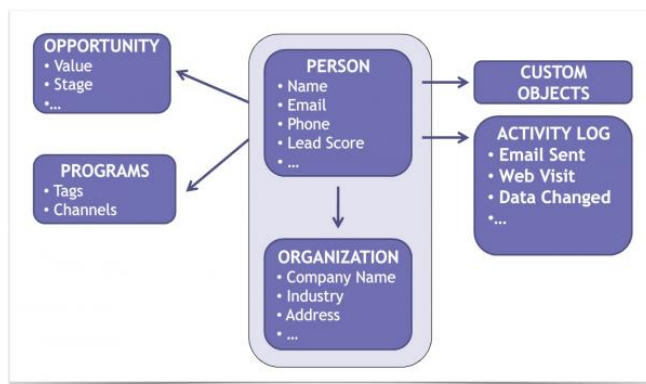
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TRACE DUPLICATES TO THE SOURCE

Common sources of duplicates (and suggested solutions)

1. CRM Sync



2. Manual Entry in CRM

A screenshot of a CRM 'Form' interface. The left sidebar shows a navigation menu with '1 Field Details', '2 Form Settings', and '3 Finish'. The main area is titled 'Field Details' and shows a form with fields for 'First Name', 'Last Name', 'Email Address', and 'Company Name'. A 'Submit' button is at the bottom. On the right, a 'Properties' panel shows configuration options for the 'First Name' field, including Label, Field, Field Type (Text), Label Width, Field Width, and Instructions. The top of the interface includes 'Community', 'Help', and 'Auto-saved: Sep 21, 8:43 PM PDT'.

3. Different Emails; Same Person

A screenshot of a CRM 'Smart List' for 'Gomez Test Smart List 7'. The table shows three records with the same last name 'Gomez' but different email addresses.

Id	First	Last	Email
5307558	Matt	Gomez	m1a2t3t4@gomez.com
5053607	zzCheckfn43	zzCheckln43	matthew.gomez@laureate.net
5307559	Matt	Gomez	1234matt@gomez.com

Solutions:

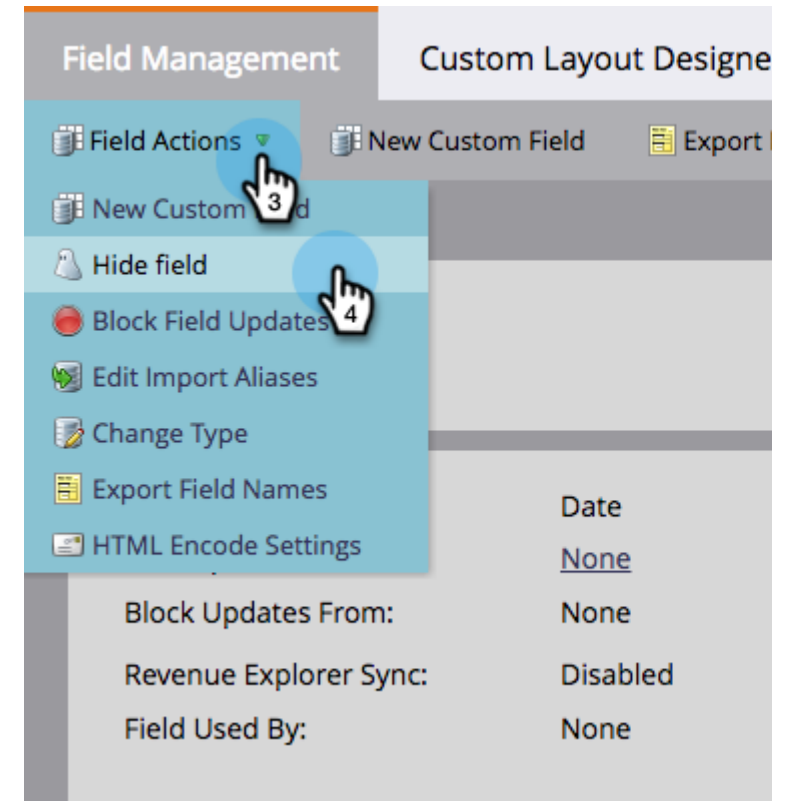
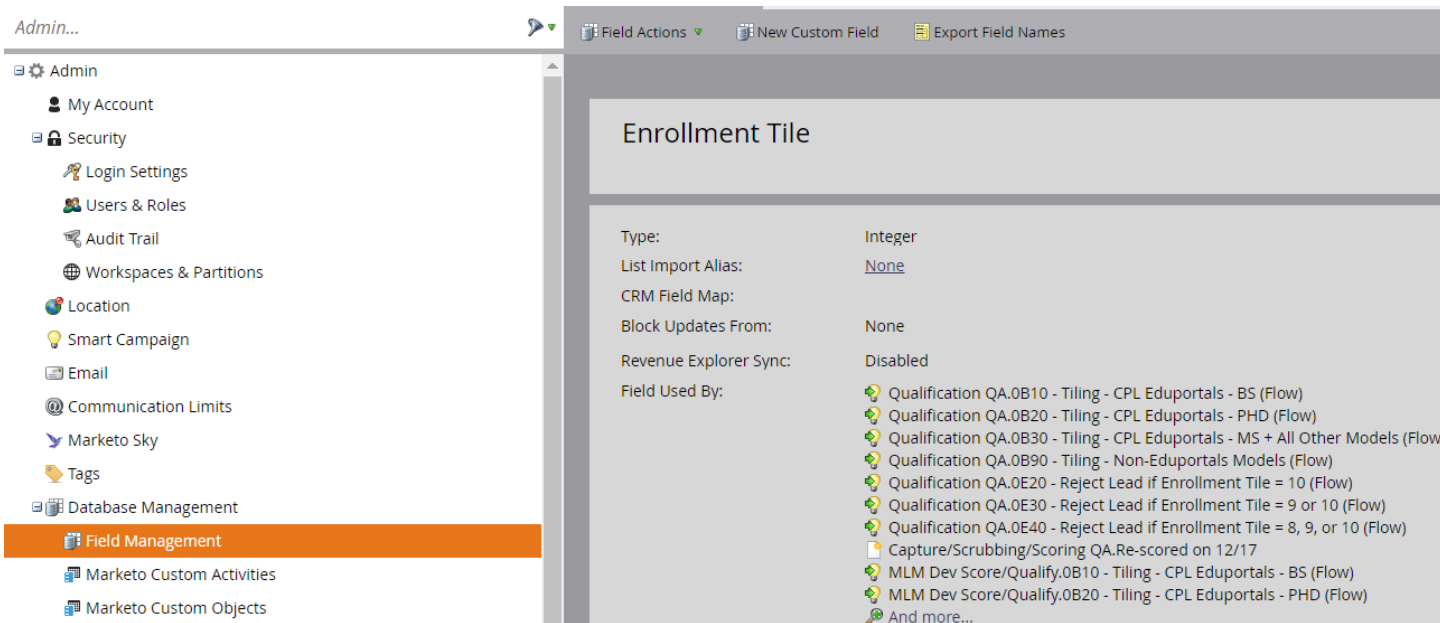
1. Work with your Sales Ops counterparts to improve your sync to work with Marketo.
2. Create a Marketo form for manual entry of leads into CRM.
3. Create a “Secondary Email Address” field to store alternate email address, then merge records (from CRM). Add a preference center.

Unused Fields



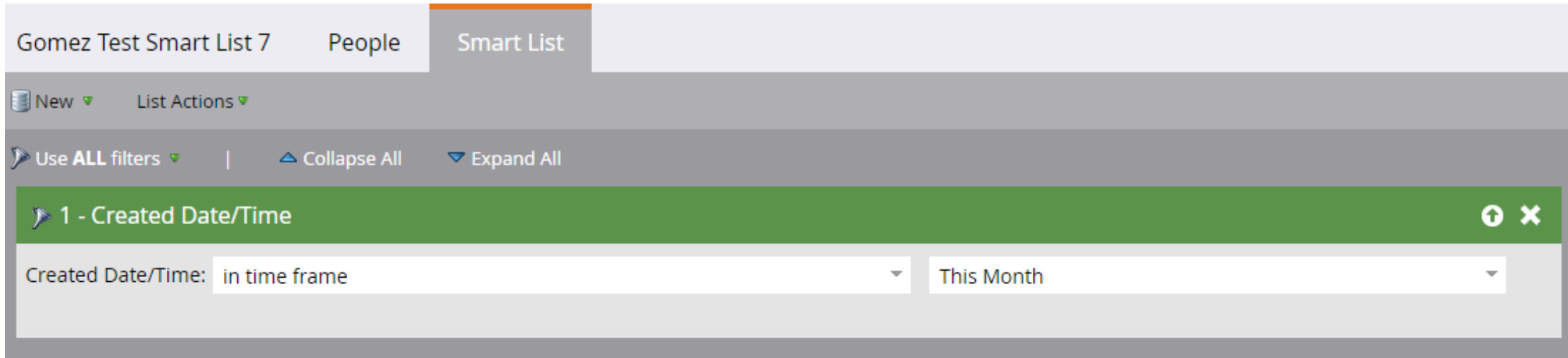
Unused Fields: What does Marketo already provide for you?

- Field Management in Admin section
 - Hide unused fields
 - View Field Sync to CRM
 - Field Used By
- Smart Lists to view field contents



What can you do today?

- Hide unused fields from view
- Run smart lists to see which fields are blank
- Work with your CRM-side partners to hide fields from sync



What can you do today?

- Hide unused fields from view
- Run smart lists to see which fields are blank
- Work with your CRM-side partners to hide fields from sync

Id	Account So...	Additional ...	Address Lin...	Address Lin...	Admissions ...	Adometry ID	Age Range	Alternate P...	Alternate Pr...	Alternate Pr...
5307408										
5307404										
5307406										
5307403										
5307409										
5307405										
5307402										
5307414										



Archiving



Archiving

- Regular exercise (at least annually)
- Archived assets are hidden from Revenue Explorer and separated in Analytics
- Keep the same folder structure as in active folders
- Turn off engagement programs!
- Deactivate smart campaigns!
- Unapprove landing pages!
- Consider deleting the forms!

The screenshot displays a table of archived landing pages with the following columns: Test, Page Name, Approved, Last Updated, Program, and Template. The 'Approved' column contains green checkmarks and yellow warning triangles. The 'Last Updated' column shows various dates and times. A search bar at the bottom right is labeled 'Search LP by an actual URL'.

Test	Page Name	Approved	Last Updated	Program	Template
Page		✓	Jun 18, 2019 6:57 PM		
Page			Jun 17, 2019 1:38 PM		
Page			Jun 17, 2019 1:38 PM		
Page		⚠	Jun 6, 2019 12:55 PM		
Page		⚠	Jun 6, 2019 12:58 PM		
Page		⚠	Jun 6, 2019 4:29 PM		
Page		⚠	Jun 6, 2019 4:37 PM		
Page		⚠	Jun 6, 2019 12:54 PM		
Page		⚠	Jun 6, 2019 4:37 PM		
Page		⚠	Jun 6, 2019 4:37 PM		
Page		✓	Jun 18, 2019 7:01 PM		
Page		✓	Jun 18, 2019 7:01 PM		
Page			Jun 17, 2019 1:38 PM		
Page			Jun 17, 2019 1:38 PM		
Page			Jun 17, 2019 1:38 PM		
Page		⚠	Jun 6, 2019 12:54 PM		
Page		✓	Jun 18, 2019 6:57 PM		
Page		⚠	Jun 7, 2019 4:28 PM		
Page			Jun 17, 2019 1:38 PM		
Page		⚠	Jun 6, 2019 4:37 PM		
Page		✓	Jun 18, 2019 6:58 PM		
Page		✓	Jun 18, 2019 6:58 PM		
Page		✓	Jun 18, 2019 6:58 PM		
Page			Jun 17, 2019 1:40 PM		
Page		✓	Jun 18, 2019 7:00 PM		
Page		✓	Jun 12, 2018 11:24 AM		
Page		✓	Jun 18, 2019 7:00 PM		
Page		✓	Jun 18, 2019 6:59 PM		
Page		✓	Jun 18, 2019 6:59 PM		
Page		✓	Jun 18, 2019 6:59 PM		



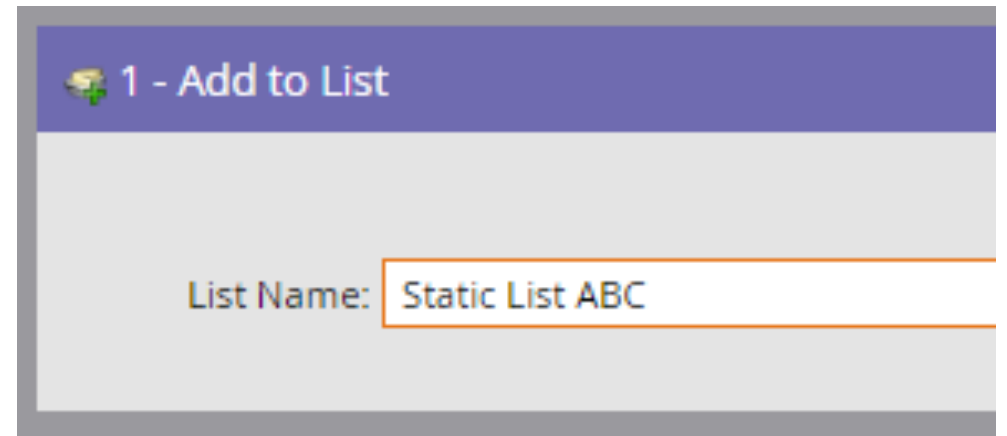
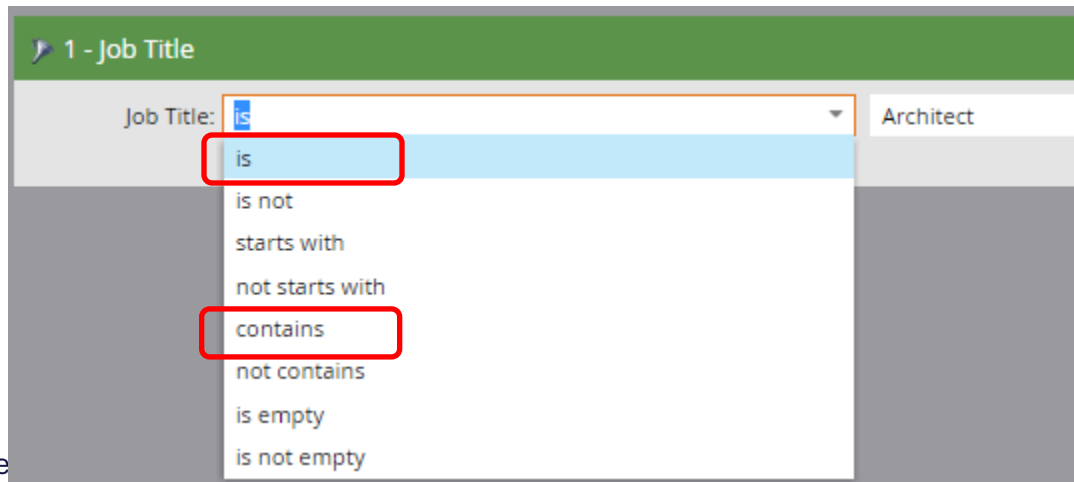
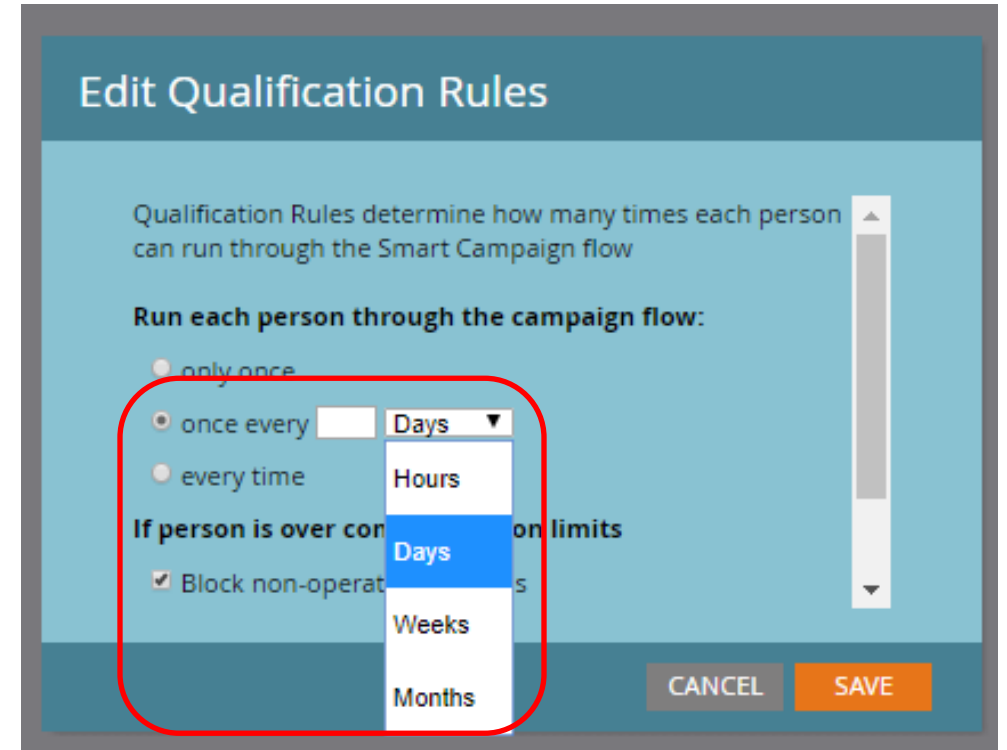
Efficiency tricks



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Make Marketo Fast

- Use recurrent batch vs. Triggers
- Use static lists vs. [nested] smart lists
- IS, not Contains; IS, not IS NOT
- Standard Reports with subscriptions and easy access



Negativity Filters

Reversed logic: Negative ALL is the opposite of the Positive ANY

A screenshot of a filter menu interface. At the top, there are three buttons: 'Use ALL filters' (highlighted with a red box), 'Collapse All', and 'Expand All'. Below these are three filter categories, each with a green header and a white filter input field:

- 1 - Not Opened Email**: Email: is any
- 2 - Not Was Sent Email**: Email: is any
- 3 - Not Clicked Link in Email**: Email: is any

Includes a person who opened email ABC

A screenshot of a filter rule configuration. The header is '1 - Not Opened Email'. Below it, the filter is set to 'Email: is not' with a dropdown arrow and the value 'ABC' entered in a text box.

Includes a person who opened email ABC but not on 7/15/2019;
Includes a person who opened DEF on 7/15/2019

A screenshot of a filter rule configuration. The header is '1 - Not Opened Email'. Below it, there are two filter conditions:

- Email: is not (dropdown arrow) with the value 'ABC' entered in a text box.
- Date of Activity: is not (dropdown arrow) with the value '07/15/2019' entered in a text box.

Red Flags

- **Security / Compliance** concerns
- **Lack of clarity** & documentation
- **Dramatic increase or decrease** in ANY metric
- **Data Quality** critical issues
 - Duplicates
 - Key fields
 - Consent
 - Bounce rate
- **Messy folders, names, assets**
 - Sloppy, harder to find
- **Excessive cross-reference**
 - Harder to check
- **Custom everything**
 - Lack of standardization and quality control
- **Inconsistent errors**
 - You don't know what you don't know



Safety Nets

- ✓ Approval process; a second pair of eyes rule
- ✓ Never launch immediately
- ✓ Start strict [easier to give rights vs. revoke]
- ✓ Always spot check [random 2-7 records]
- ✓ Check logic [counter logic or the residual]
- ✓ Sandbox, small batches, weekends
- ✓ Problem zones: set up reports

Simple is good.

Listen to the butterflies in your stomach.

Better looking is not as good as proven.

Higher pressure IS higher risk.



Commit to tidy up!



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Thank You



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